

Request Form Creation Checklist

Building request forms can be a big undertaking. There is a lot to consider before you start and during creation. That's why we have compiled a comprehensive checklist to help you every step of the way.

Before you begin, answer these:

- What type of content is this for?
- What do I want this form to achieve?
- Are there any bottlenecks or known process gaps I want to solve?
- What information does my team need to complete the request and operate efficiently?

While you are building, check these:

- Identify who is responsible for accepting requests.** Include the **Acceptors** field and add the person(s) responsible for accepting requests. ⚠ Without an Acceptor, no notifications will be sent when the form is submitted!
- Include questions that will give your team enough direction to do their work.** This can't be achieved with a single field, but it's important to consider throughout the building process. Be sure to ask for any details that should be included, and provide ample opportunity for your requesters to share their ideas to reduce feedback cycles once the work is ready for review.
- Identify the questions that are essential to completing the request.** Each field has the option to be required for form submission, indicated with an asterisk to the requester. When editing a field, select the checkbox next to **Required**.
- Include instructions that will help requesters understand how to complete the form.** Using the **Static Text** field gives you the ability to provide instructions or headers for clear communication. Utilize **Helper Text** in **Text**, **Longform Text**, and **Number** fields to provide examples of the information you need or further instruction.
- Identify any resources requesters should reference, such as previously created content or company brand guidelines.** Provide these with the **Link** field.
- Consider how long your team needs to complete the request and if there are any constraints on lead times or service level agreements (SLA's).** Enforce this in your **Due Date** and **Date** fields by limiting the dates available for selection.
- Determine if there is a project template that should be mapped to the associated work.** Define this in the **Project Template** field to select the template by default. Acceptors will still be able to select from other available templates for flexibility.
- Identify any tags that should be mapped to the associated work for categorization and reporting.** Define these with the **Tags** fields.
- Determine data points that are important for your team to map to projects for visibility and reporting needs.** Use your **Custom Fields*** to track these important data points directly from the request form.

**Available only to Business and Enterprise customers.*